

Part 2B of Form ADV: Individual Disclosure Brochure

for

Alexander K. Hart Investment Advisor Representative

> 200 Brush Run Road Greensburg, PA 15601 (724) 672-3876

> > January 31, 2023

This brochure supplement provides information about Alexander K. Hart that supplements the Trustmont Advisory Group, Inc. brochure. You should have received a copy of that brochure. Please contact Alexander K. Hart, Investment Advisor Representative, if you did not receive the Trustmont Advisory Group, Inc. brochure or if you have any questions about this supplement.

Additional information about Alexander K. Hart is available on the SEC's website www.adviserinfo.sec.gov.

Trustmont Advisory Group, Inc 200 Brush Run Road Suite A Greensburg, PA 15601 (724) 468-5665 www.trustmontgroup.com

<u>Item 2 Educational Background and Business Experience</u>

Year of Birth: 1995

Formal Education After High School:

Penn State University; Bachelor of Science; Business 08/2013-05/2017 Indiana University of Pennsylvania; Master of Science; Sport Management 08/2017-05/2019

Business Background for the Preceding Five Years:

Trustmont Advisory Group, Inc.,; Investment Advisor Representative 01/2023 – Present
PWR Planners; Insurance Consultant
01/2022 – Present
Anytime Fitness; General Manager
04/2021 – 11/2021
Enterprise Truck Rental; Account Specialist
12/2019 – 04/2021
Altoona Curve; Ticket Sales Manager
08/2019 – 11/2019
Indiana University of Pennsylvania Fitness Center; Student
09/2018 – 05/2019

Item 3 Disciplinary Information

Alexander K. Hart does not have any reportable disciplinary events.

Item 4 Other Business Activities

Alexander K. Hart is involved in the following other business activities:

Insurance Consultant and employee of PWR Planners

<u>Item 5 Additional Compensation</u>

Your Investment Advisor Representative does not receive any Additional Compensation.

<u>Item 6 Supervision</u>

Trustmont Advisory Group, Inc. has created policies and procedures reasonably designed to prevent violation of the Investment Advisers Act of 1940 and the rules that the Security and Exchange Commission have adopted under the Act. Trustmont Advisory Group, Inc. does not oversee the direct investment advice that your Investment Advisor gives to a client or potential client. Client or potential clients should rely exclusively on the expertise and knowledge of the Investment Advisor for all advice and recommendations. Trustmont Advisory Group, Inc. does have guidelines on the advice that your Investment Advisor provides. These guidelines include but are not limited to: Your Investment Advisor Representative must provide advice that is in the client's best interest and must not place their interests ahead of the client's interest under any circumstances. Your Investment Advisor must follow specific fiduciary obligations when dealing with clients, obligations such as but not limited to: the duty to have a reasonable, independent basis for the investment advice provided, the duty to ensure that investment advice is suitable to meeting the client's individual objectives, needs and circumstances and a duty to be loyal to clients. Engaging in any fraudulent or deceitful conduct with clients or potential client is strictly prohibited. Examples of fraudulent conduct include but are not limited to: misrepresentation, nondisclosure of fees and/or misappropriation of client funds.

Your Investment Advisor is supervised by MaryLynne Hixenbaugh, Chief Compliance Officer, of Trustmont Advisory Group, Inc. Contact information is on the cover page of this supplement.